

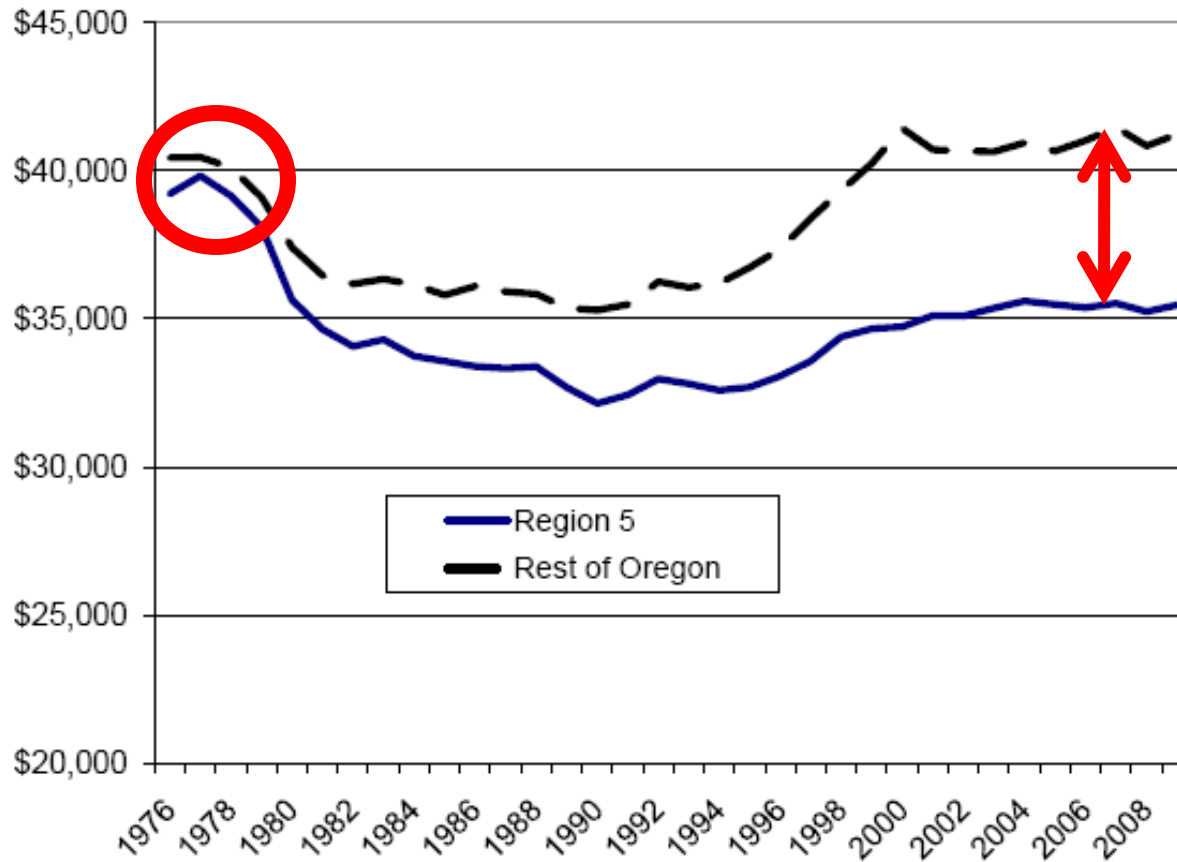
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Project Update for
City Council Work Session
November 23, 2011

- Update on topics that inform land need
 - JEO Regional Prosperity Plan
 - Employment growth
 - Land supply and consumption
- Update on potential expansion areas

Lagging Wages

Real Average Annual Wages



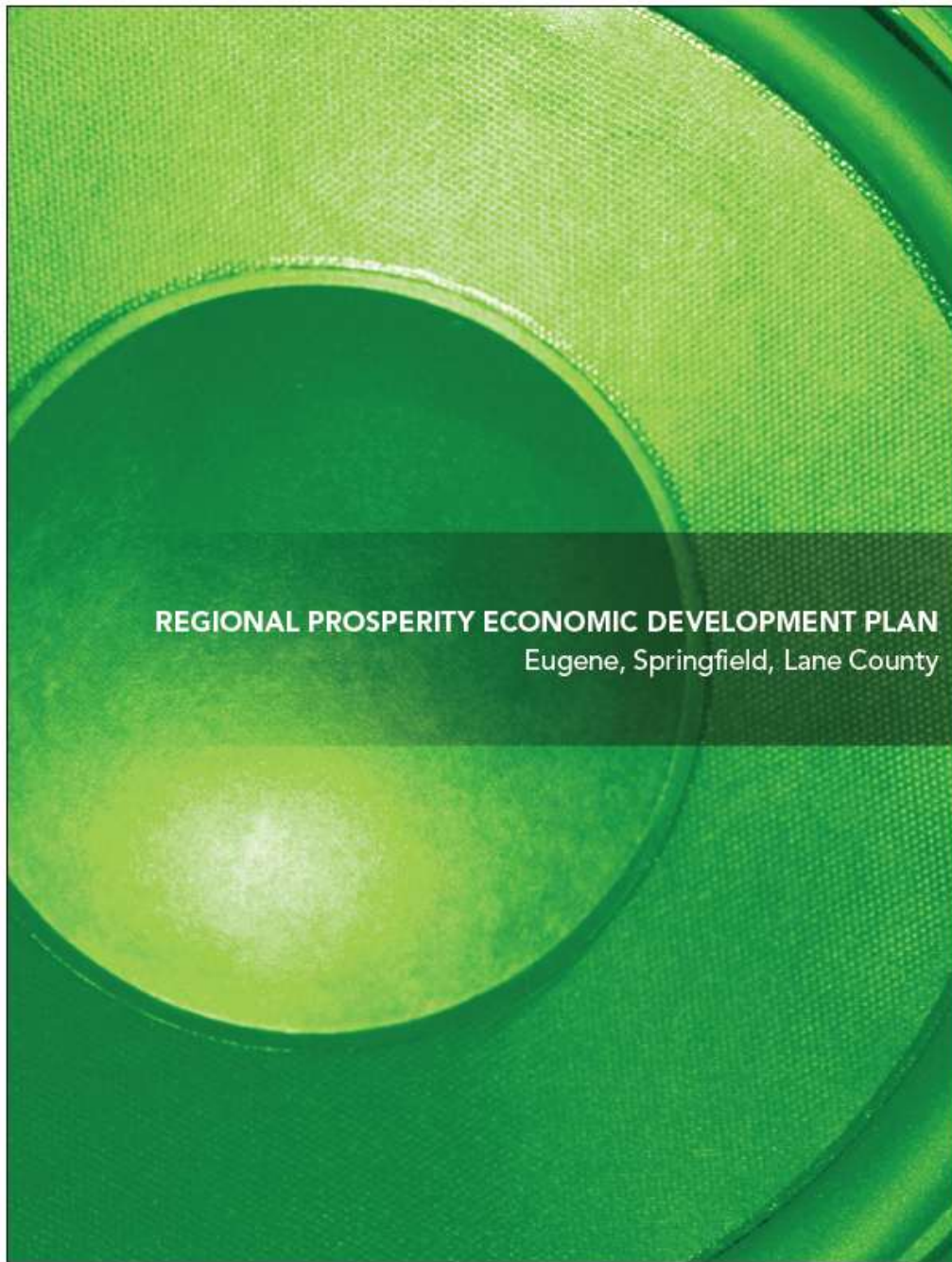
Source: Oregon Employment Department

Region 5 is Lane County

JEO Regional Prosperity Plan

- Plan seeks to raise wages and lower unemployment
- 20,000 jobs in next 10 years
- Jobs beyond what state forecasts
- Six key strategies



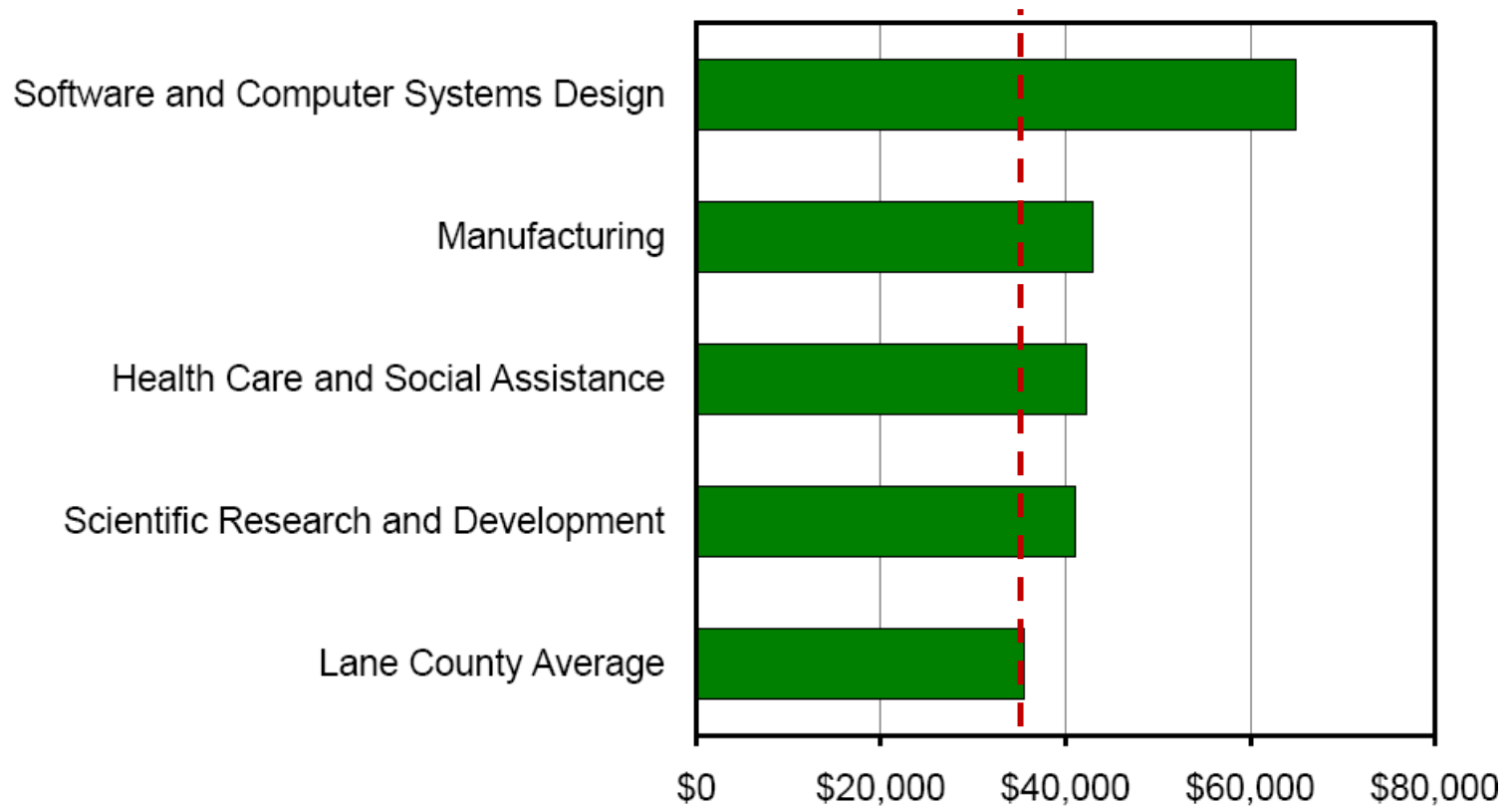


Next Economy Strategies

1. Grow Local Opportunities
2. Energize a Creative Economy
3. Invest in Tomorrow's Talent
4. Provide Basic Business Needs
5. Identify as a Place to Thrive
6. Strengthen Key Industries

Wage Clusters

Average Annual Pay of Lane County Industry Clusters, 2009



Source: Covered Employment and Wages, Oregon Employment Department

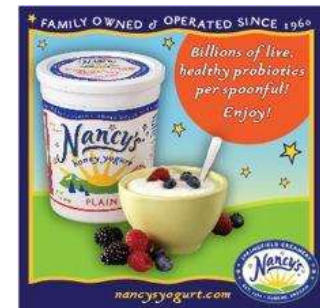
- Targeted Industries
 - Clean Technology/Renewable Energy
 - Health/Wellness
 - Advanced Manufacturing
 - Software
 - Biomedical
- Above average wages
- Positive locational factor
- Job openings



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Targeted Industry - Food

- Was not part of final JEO plan, although discussed
- Growing industry cluster
 - Production
 - Processing
 - Distribution



Targeted Industry Size Classes

- Varies by industry
- Varies by market (local, regional, national)
- Range from 1-100 acres

Industry Category	Range of Site Size (ac)	Average Minimum Site Size (if known)(ac)
Clean Tech – Biomass	1-60	25
Clean Tech – Solar	60-100+	18
Health – Care & Treatment Facilities	1-100	--
Health – Wellness/Specialty Hospital	1-60	--
Adv. Manufacturing – Materials	10-100	28
Adv. Manufacturing – Electronics	10-100	28
Adv. Manufacturing – Transportation	10-60	--
Adv. Manufacturing – Wood Products	10-60	23
Software – Data Center	60-100+	45
Software – Publishing	1-10	--
Software – Program Development	1-10	--
Biomedical – Manufacturing (pharm.)	40-60	--
Biomedical – Research/Lab Space	10-30	--
Biomedical – Design (devices)	1-10	--
Food – Processing/Distribution	10-30	--
Food – Manufacturing	10-30	--
Food – Research	10-30	--
Trade – Wholesale Trade	40-60	--
Trade – Distribution	1-60	31

Employment Growth

- Current forecast for 2008-2018 = 0.9%
- Anticipated forecast for 2010-2020 = slightly higher

Industrial Land Consumption Since 1990

- 2 sites between 20-50 acres

The Register-Guard



- 3 sites larger than 50 acres



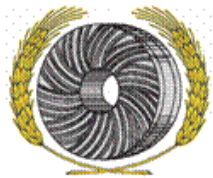
Vacant Industrial Lands

Plan Designation	10-20 acres	20-50 acres	50-100 acres
Campus Industrial	1	1	0
Light/Medium Industrial	1	4	0
Heavy Industrial	1	1	0
Special Heavy Industrial	0	0	0
Total	3	6	0

*Some of these sites have constraints

Limitations of Current Inventory

- State has not been referring for sites larger than 50 acres
- Businesses lost



GRAIN MILLERS










- Businesses constrained








Portfolio of Existing Vacant Industrial Sites

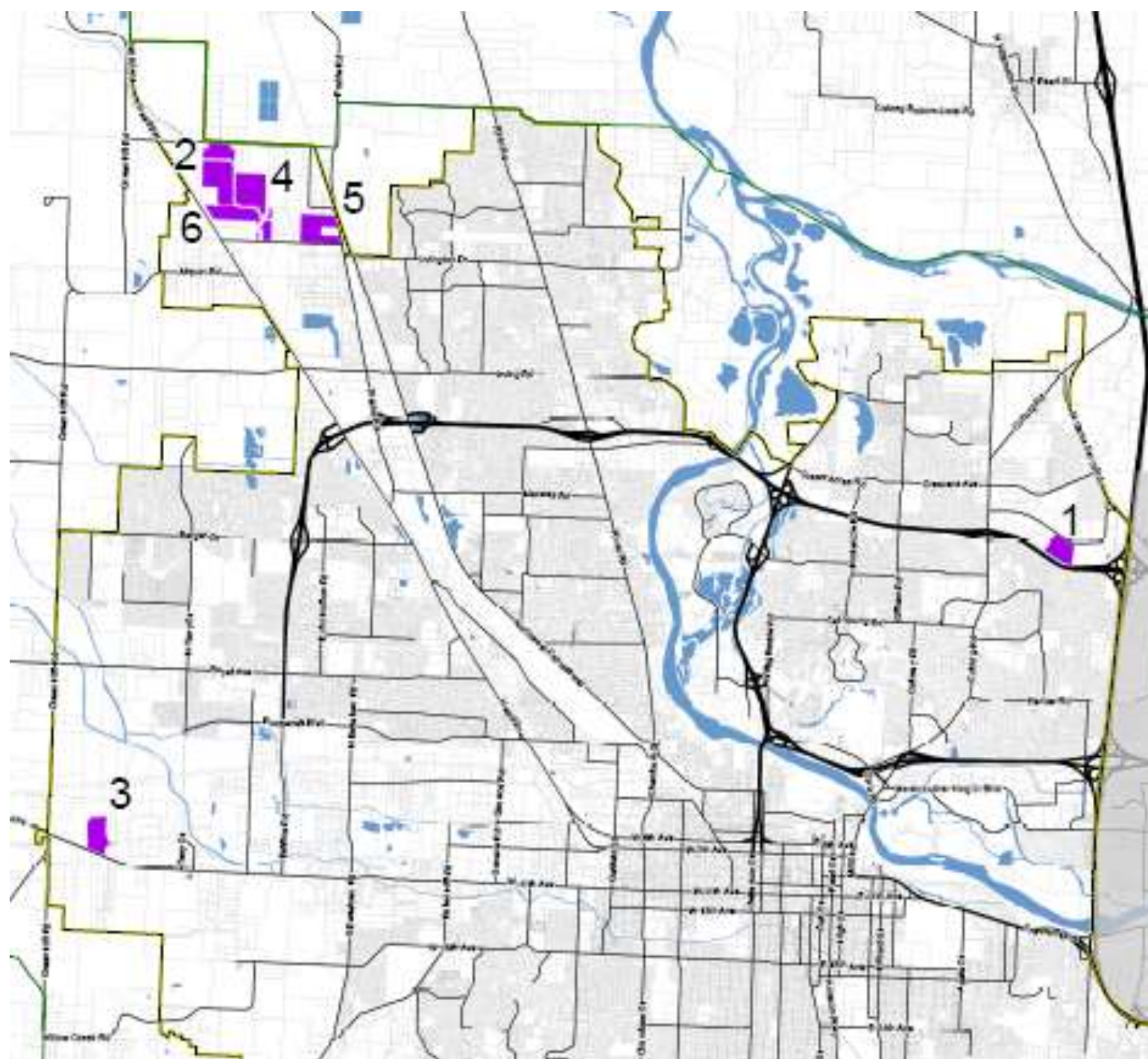
20 – 50 acres

I-1	I-2	I-3
		
		
		
		

50+ acres*

I-1	I-2	I-3
		
		

* Should include at least one site that is 100 acres in size




Comparing Supply & Demand

- Limited supply of large sites
- Large sites needed for targeted industries
- Allocate jobs to sites

- 

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Provide Ample Economic Opportunities for all Community Members




To meet the economic needs of Eugene residents today and in the future, we will pursue a multi-faceted approach that utilizes several strategies:

 1. Meet all of the 20-year commercial land (office, retail and restaurant) within the existing urban growth boundary (UGB). Prior to this date, not only the inclusion of small amounts of commercial lands within areas that are expected to accommodate other uses)
 - Conduct a special needs study and to develop terms of reference for commercial land needs study. The study will be used to determine if the UGB is sufficient to meet the community's long-term commercial land needs.
 - Change the land use code to increase flexibility for commercial uses allowed within industrial and employment zones.
 - Develop the multi-modal and transit corridor and transit building framework that the Board of Community Development will use for additional strategies and actions to facilitate development in areas between the UGB and commercial areas and corridors.

Transportation Policy

It is a priority of the city to provide a transportation system that is efficient, safe, and sustainable. The plan also addresses the need for a multi-modal transportation system, such as transit, walking, and cycling, to reduce the city's dependence on single-occupancy vehicles. To meet the plan, the city will:

 - Develop a multi-modal transportation system that is efficient, safe, and sustainable.
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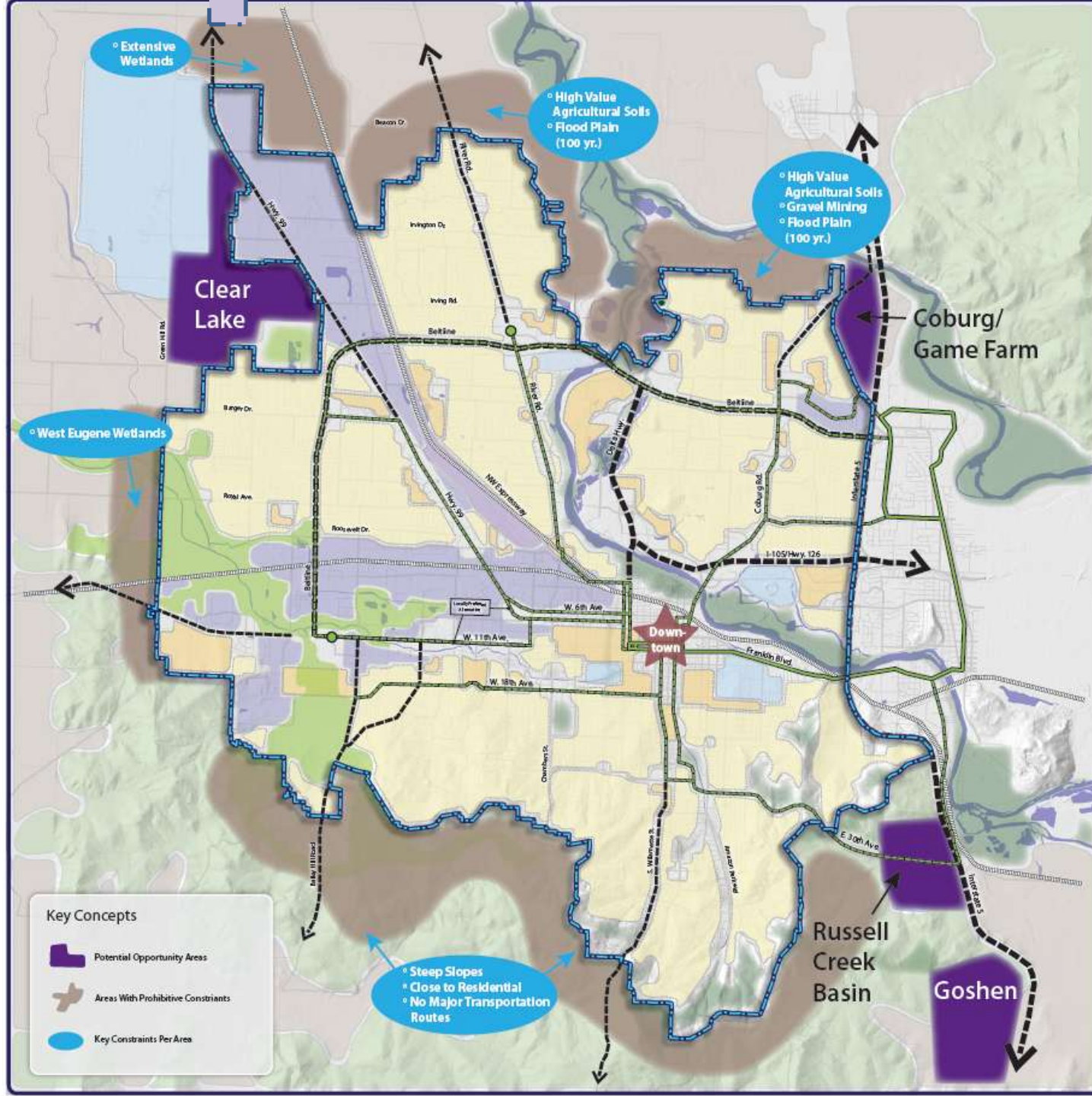
Map showing the location of commercial land needs in Eugene, Oregon. The map includes the city boundary and surrounding areas. A legend indicates the following categories:

 - Commercial Land Needs
 - Industrial Land Needs
 - Residential Land Needs
 - Public Land Needs

The map shows the location of commercial land needs in Eugene, Oregon. The map includes the city boundary and surrounding areas. A legend indicates the following categories:

Expansion Area Analysis

- Analysis of all potential expansion areas must be done regardless of amount
- Update on mapping/data findings
- Update on property owner contacts

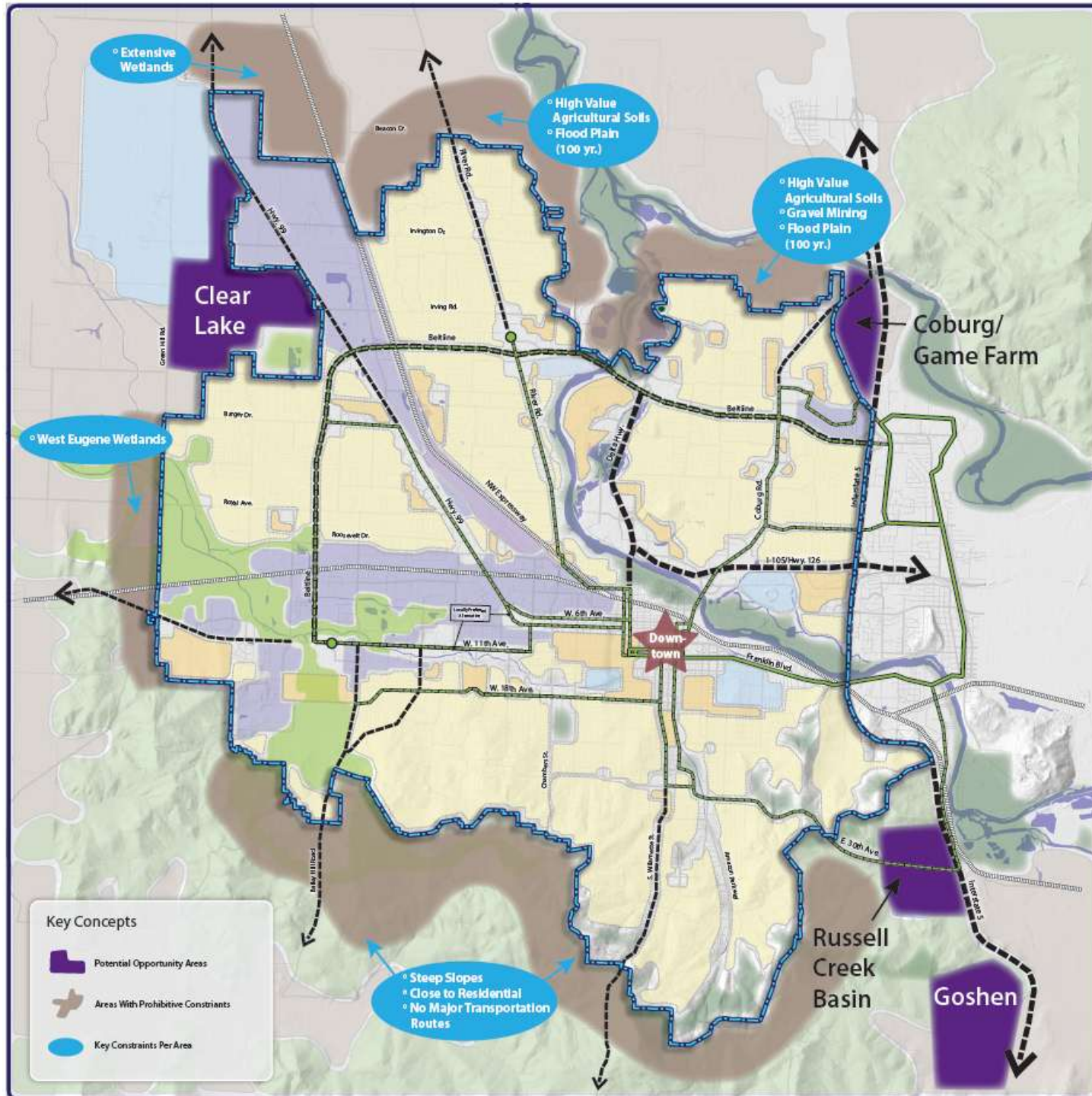


Russel Creek



★ Support Industrial

★ No Response

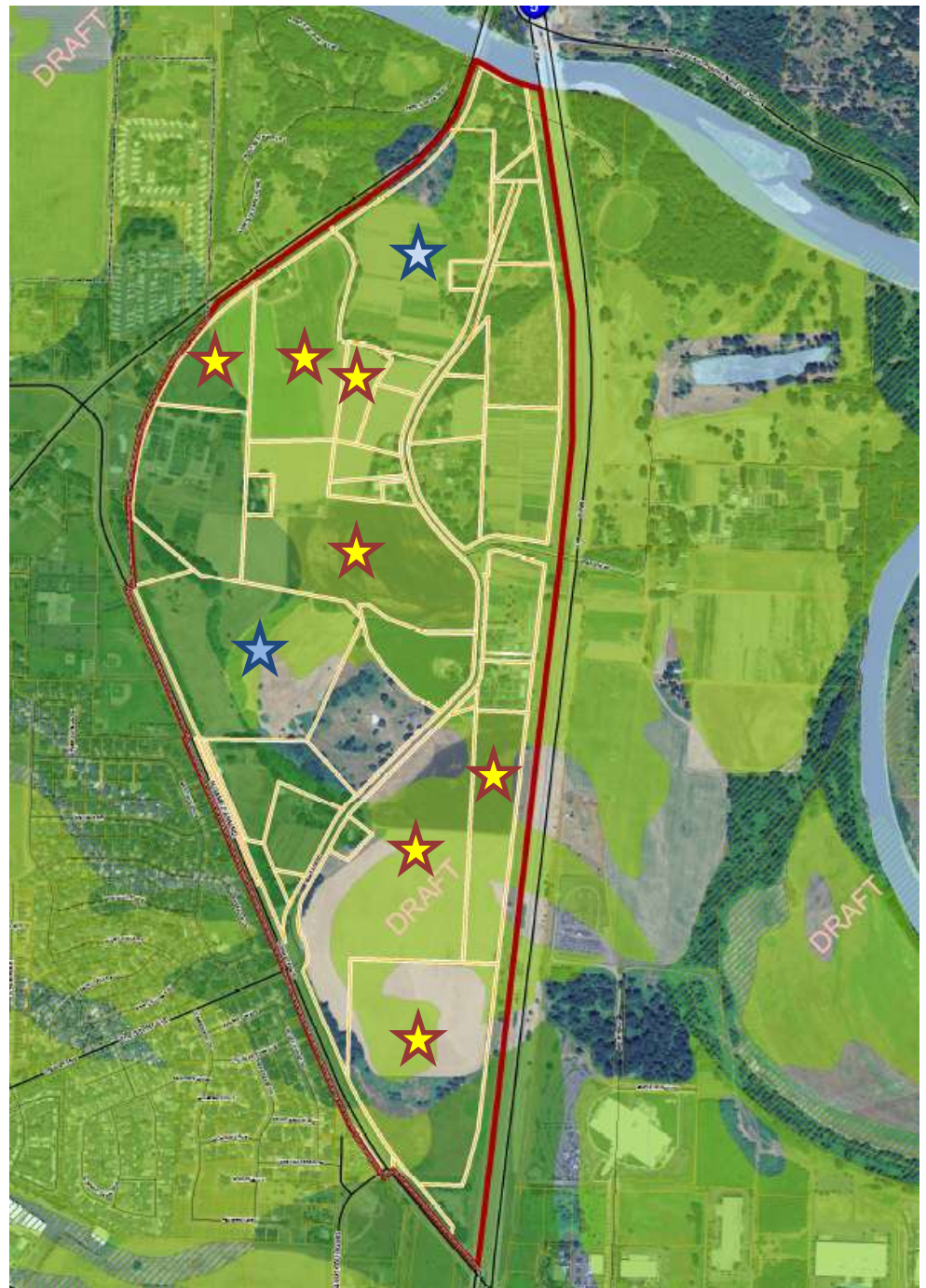


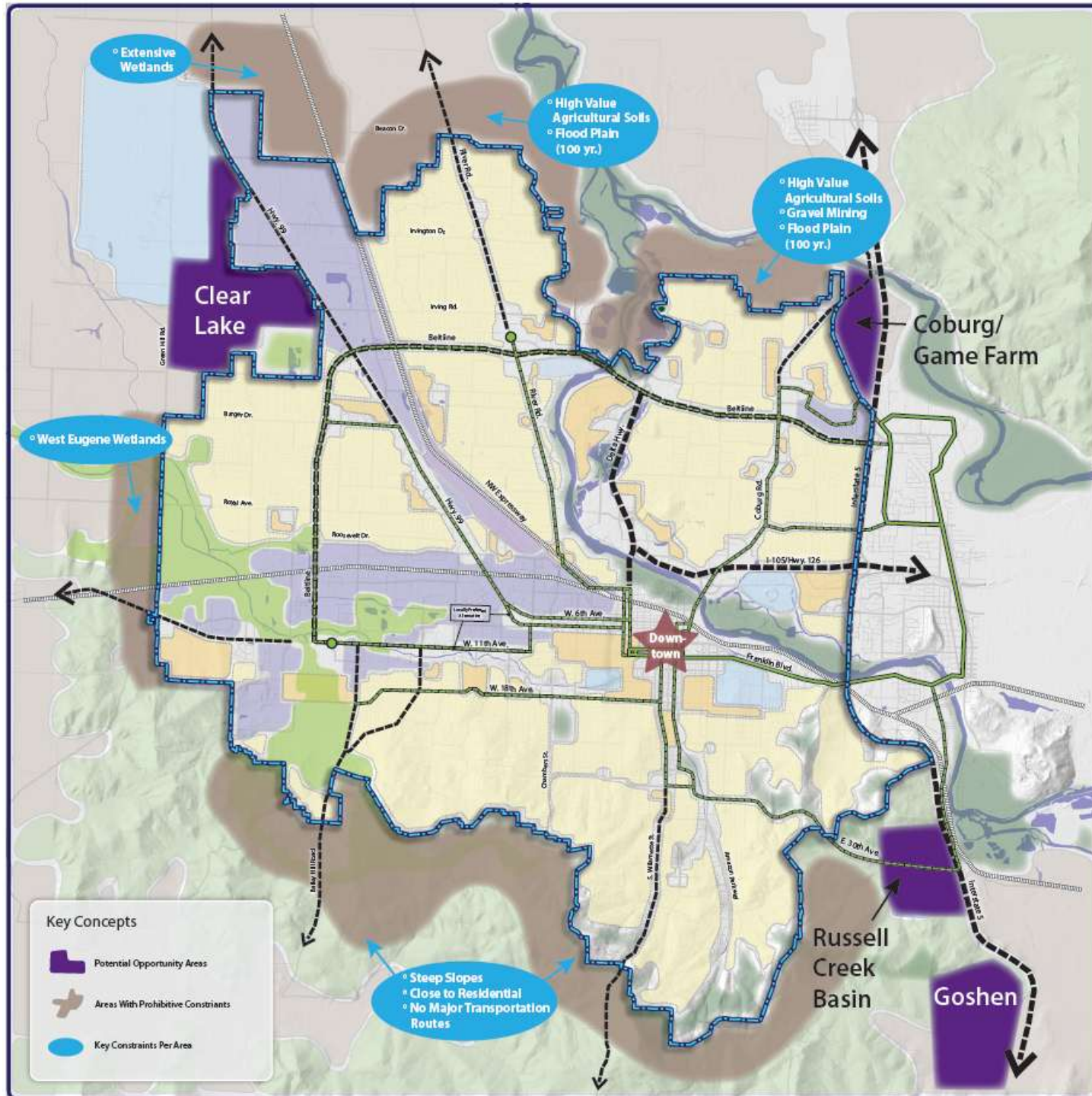
Game Farm

- 350 ac initial study area
- 5 owners received letters (195 ac)
- 3 support further study (139 ac)
- 2 have not responded

★ Support Industrial Use

★ No Response

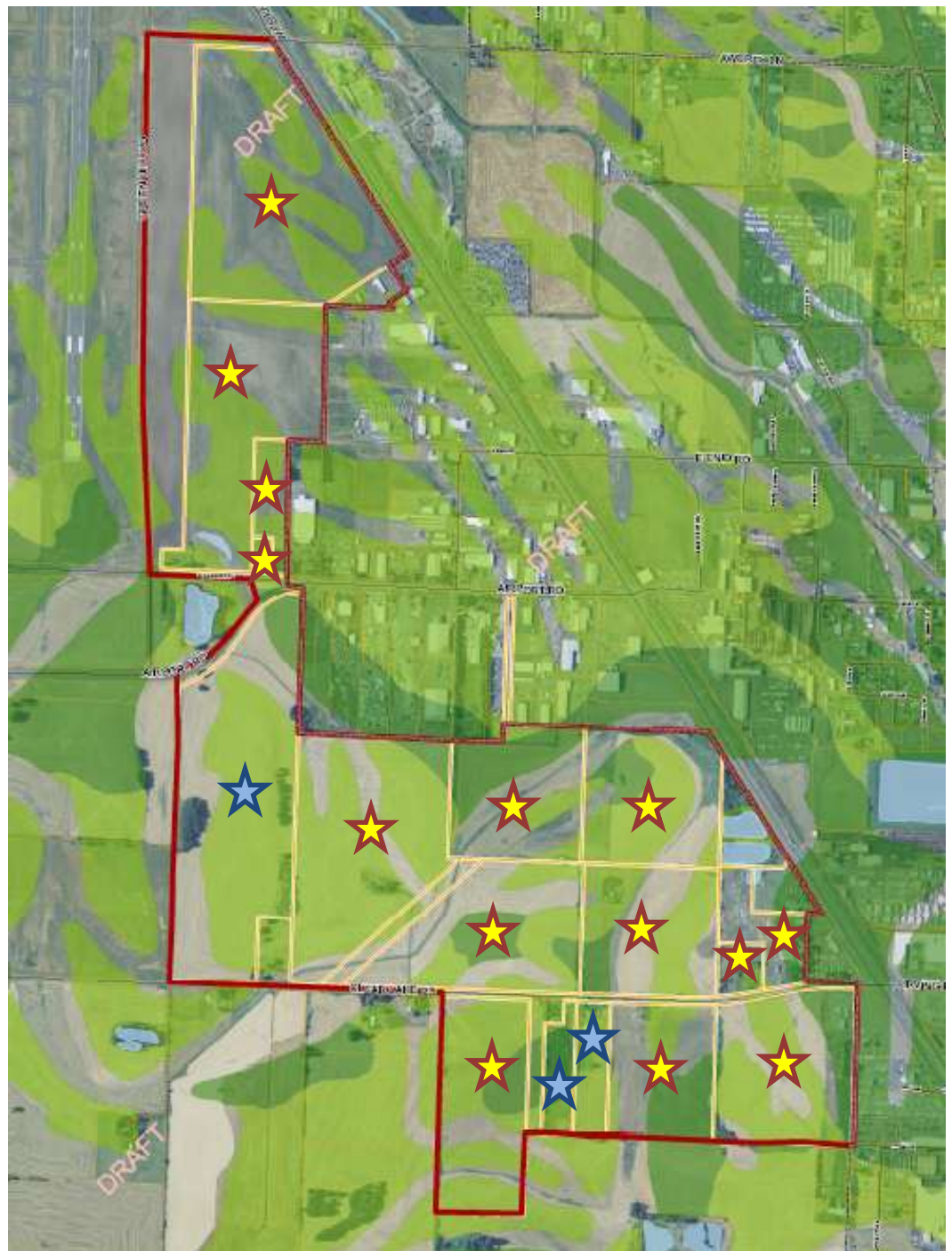




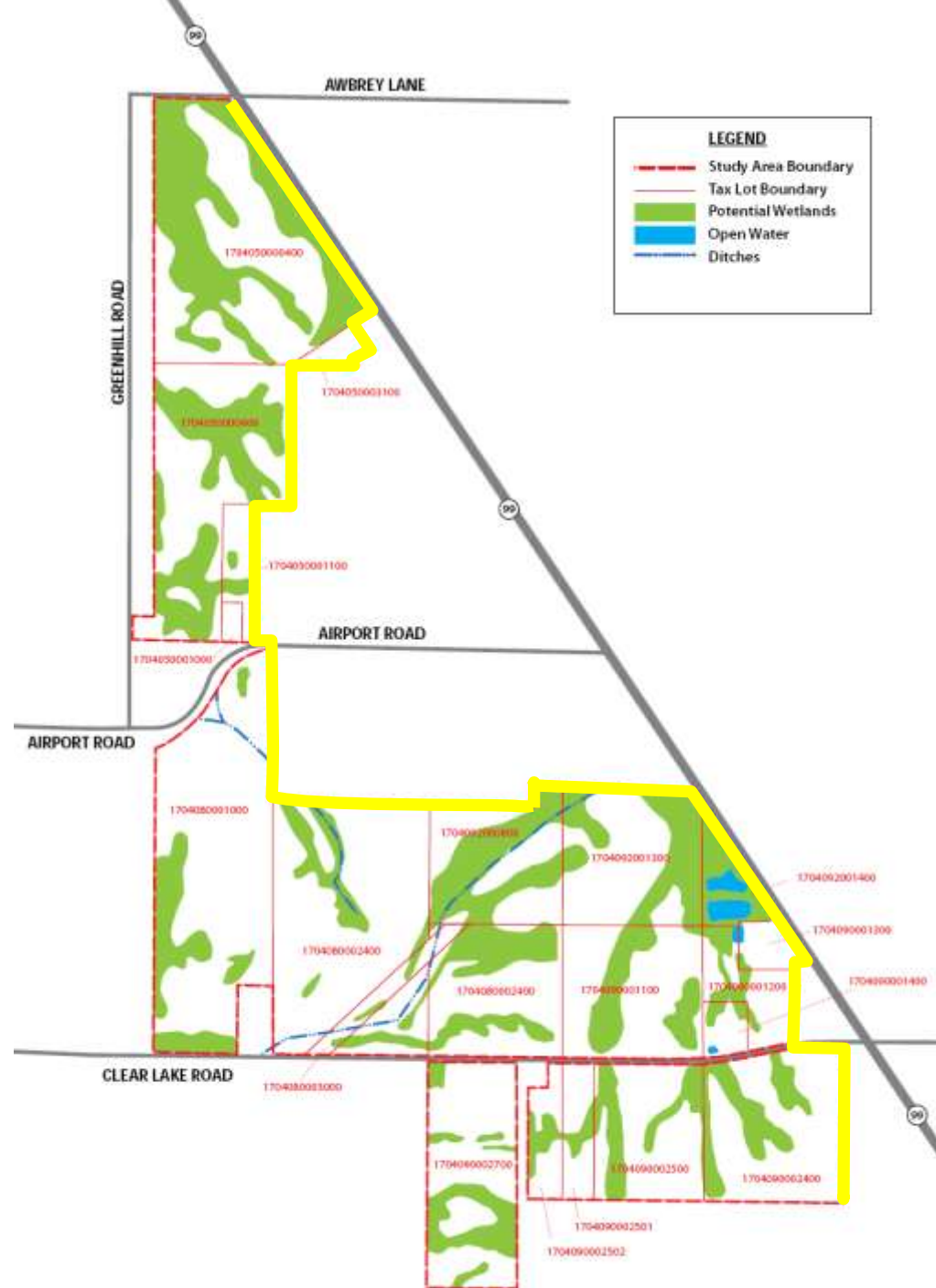
Clear Lake

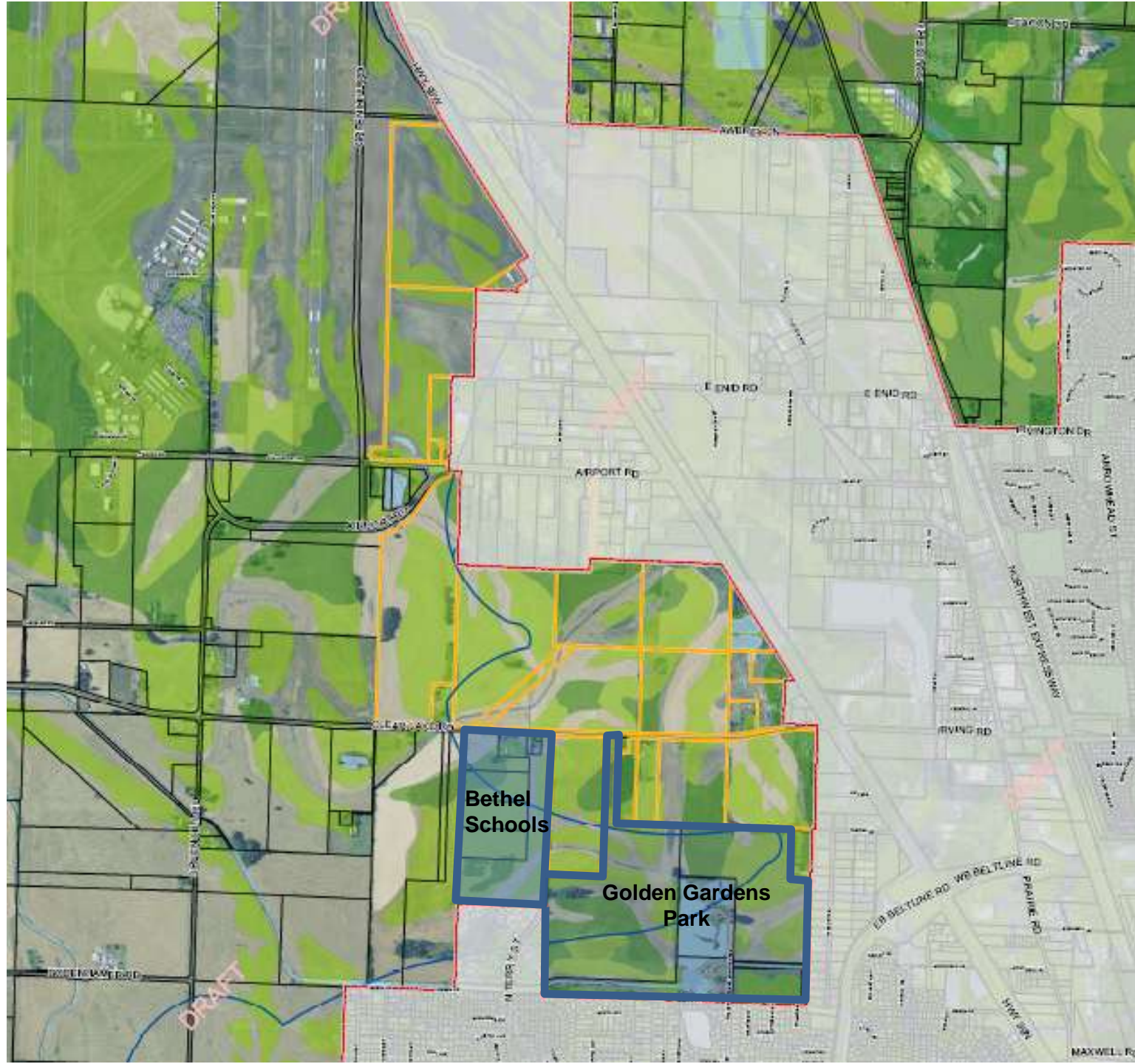
- 850 ac initial study area
- 20 owners received letters (640 ac)
- 14 support further study (522 ac)
- 3 are publicly owned
- 3 have not responded

- ★ Support Industrial Use
- ★ No Response



Clear Lake





**Bethel
Schools**

**Golden Gardens
Park**

Monitoring

- Job growth and growth forecasts
- Use of large sites
- Existing companies efforts
- State referrals to Eugene
- Brownfields/land trust

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Industrial Next Steps

- Ongoing – Online Open House
- 12/6 - Open House
- 12/14 - City Council Work Session



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